Note: *The questions below are project-team centered and do not include the usual questions you would ask for audience analysis, purpose and goals of the CBT, etc.*

Planning Phase

Begin with a Project Kickoff meeting. Request that all stakeholders and project team members attend. At the meeting, ask the following key questions:

- Who are the subject matter experts (SMEs)?
  - What are the chances of a SME being replaced before the CBT is complete? Explain challenges that could delay the CBT if a new SME enters the picture.
- Do SMEs know each other? Will it be possible for them to do reviews together in person? If not, could they do them together via phone?
  - Could one SME be the lead and be responsible for rolling all edits/comments into one document?
- How many CBTs/WBTs have the SMEs personally taken, and how many have they ever been a SME for?
  - What are the SMEs' pet peeves about e-Learning?
- What are the source documents? Have the SMEs reviewed them and approved their content?
- If the e-Learning will be teaching how to use software, do SMEs agree that every function should be covered in the CBT, or are there some little-used functions that could/should be left out?
- What would be a reasonable timeframe for SMEs to return edits and comments?
- Do the SMEs have the total and final say in content, appearance, and functionality, or will the PM, CEO, or other stakeholders also have some say?

Design & Development Phase

- If CBT will be teaching software and will include demos, simulations, or guided practice, ask for the user ID and password to get you into the system.
- When you send them pieces for review, provide a date by which you need their feedback. If applicable, tell them that development will be minimized or paused completely until you receive their feedback.
- At the end of the prototype review meeting, reassert that this IS the design, and unless they want to incur scope creep and more cost, this is what the CBT will look like, act like, etc.
- If you get a SME edit or comment that conflicts with the agreed upon design, request a meeting with PM and stakeholders.
  - Prepare an estimate for the cost of the proposed design change, and ask the PM to sign off on the proposed change.
  - Be sure everyone is in agreement with the changes and cost.
- Each week, send a summary to the PM of the work you have completed so they understand the CBT status and have a better idea of how you've spent your time.

At the end of the project, hold a Post-Mortem or Lessons Learned session to discuss what went well and what could have been done better.

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